1 Michael Goering (Special Needs Trust) Case No. 0575302

Attorney Knudson, David N. (for Petitioners/Trustees Michael Poppacoda & Joyce Thomas)

Petition Nineteenth Account and Report of Co-Trustees, and Petition for Its

Settlement, For Approval and Allowance of Trustees' Compensation and Attorney's Fees, for Appointment of Successor Co-Trustee; and for Instructions to Make Payments to Related Party on Behalf of Beneficiary

of the value of the assets for general services totaling \$2,105.80 plus 156 hours @ \$15/hr. (\$25/hr. for each trustee, totaling \$400.00) for specific services such as taking the beneficiary to appointments that require the presence of both trustees.) Aff. Pub. Sp. Ntc. Pers. Serv. Conf. Screen Dutles/Supp Objections Video Receipt CI Report ✓ 2620(c) ✓ Order Aff. Posting Status Rpt UCCJEA Citation FTB Notice of the value of the assets for general services totaling \$50,000.00 for specific services such as taking the peneficiary to appointments that require the presence of both trustees.) Attorney - \$3,277.50 (per ifemization and declaration, 8.65 hrs. at \$300/hr. attorney time and 4.10 hrs. @ \$75/hr. paralegal time) Costs - \$200.00 (filing fees) Petitioner's state pursuant to the Order establishing the Trust, if the balance of the Trustee's checking account exceeds \$10,000.00 excess funds are to be transferred into the Trust's blocked account. No transfers were made during the accounting period. The balance in the checking account presently exceeds \$10,000.00; while the fees, attorneys fees and accounting fees will reduce the balance in the checking account, petitioner requests authority to transfer the sum of \$20,000.00 to the trust's blocked account. A separate order authorizing the deposit of \$20,000.00 to the blocked account will be submitted prior to	Age: 49 years		MICHAEL PAPPACODA and JOYCE THOMAS,	NEEDS/PROBLEMS/COMMENTS:
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1(additional page) Michael Goering (Special Needs Trust) Case No. 0575302

Co-Trustee, Michael Papacoda, passed away on 02/18/2016, it is necessary that another co-trustee be appointed. Joseph Thomas has knowledge and experience with the administration of the trust, he is the brother of Michael Goering and is familiar with his care and needs. He resides in the same residence, he is now willing to act as co-trustee with his mother, Joyce Thomas. The order establishing the Michael Goering Trust provides, at page 15, lines 5 through 9, "that if any of the original trustees shall fail to act, the surviving trustee shall act as trustee. Any trustee may appoint a successor or co-trustee, subject to court approval and a new bond being obtained."

By the execution hereof, Joyce Thomas appoints and requests that the court approve the appointment of Joseph Thomas as a co-trustee in place of Michael Pappacoda.

Petitioner states as set forth in this accounting and as affirmed in the accountings filed over more than 15 years, the trustees have made payments to Joyce Thomas, mother of the beneficiary, and the person in whose home he resides for his special needs. Payments made monthly include:

PG&E	\$250.00
Care for the beneficiary	\$200.00
Housekeeping services	\$250.00
Cable TV	\$250.00

In addition telephone and internet services are provided to the residence with a portion paid by the trust and the balance paid by Joyce Thomas. During the accounting payments to AT&T were approximately \$109.00 per month. In addition, the Trustees reimbursed Joyce Thomas for various items purchased for the beneficiary.

Petitioners requests the authority to continue making payments to Joyce for the benefit of the beneficiary, subject, always, to review by the court upon the filing of each annual accounting.

Petitioners pray as follows:

- 1. That the Nineteenth Account and Report of Trustee is approved, allowed and settled;
- 2. That all acts and transactions of the Trustee and shown in the account be approved;
- 3. That the Trustees be allowed the sum of \$2,705.80 for their services as Trustees;
- 4. That the Attorney for the Trustee be allowed the sum of \$3,277.50 for his legal services rendered to said Trustees plus costs of \$200.00 during the account period.
- 5. That Trustee be instructed an directed to continue making payments to Joyce Thomas for housekeeping services, care services, cable television and to pay an equitable share of the AT&T charges.
- 6. That Joseph Thomas be appointed Co-Trustee of the Trust to act with Joyce Thomas;
- 7. That bond be waived for good cause;
- 8. That the Trustees be authorized and directed to deposit the sum of \$20,000.00 to the trust's blocked account.

Please see additional page

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Declaration of Joyce Thomas filed on 04/12/2016 states the hours expended each month as Trustee vary slightly, however, on a general basis the following duties are performed:

Financial Management: Ms. Thomas estimates that the total time expended on financial management is 3.5 hours per month.

Vehicle Maintenance: Ms. Thomas estimates that the total time expended on maintenance for the trust owned vehicle is 6 hours per year.

Shopping Trips: Ms. Thomas estimates that shopping trips with Michael average 8 hours per month. **Accounting and Record Keeping:** In addition to the financial matters above, Ms. Thomas states she spends approximately 6 hours per year.

Total time spent is approximately 13 hours per month or 156 hours per year. The requested fees for "ordinary services" of \$2,105.80 equates to \$13.50 per hour which is significantly lower than the \$25.00 requested in the itemized services in the petition.

Attorney: Holley H. Perez (for Petitioner/Conservator Barbara Romero)

Fourth Account Current and Report of Conservator and Petition for Settlement and Allowance of Conservator's and Attorney's Compensation; and Petition for Instructions regarding Donation Authorization

Account period: 2/1/14 – 12/31/15 Accounting - \$647,449.25 Beginning POH - \$371,066.37 Ending POH - \$14,987.53 Finding POH - \$11,987.53 Finding POH - \$11,987.53 Finding POH - \$1,250.00 (allowed per Local Rule) Conservator - waives Attorney - \$1,250.00 (filing fees) PTC			PARRADA POMERO conservator is notitione	1
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Aff.Pub. Aff.Pub. Sp.Ntc. Pers.Serv. Conf. Screen Letters Duties/Supp Objections Video Receipt CI Report ✓ 2620(c) Aff. Posting Status Rpt Citation Petitioner states the conservatee has a niece, Natalie Lopez. Natalie is 37 years old and has a diagnosis of pulmonary hypertension. She is being evaluated for a possible lung transplant. Her family started a "Go-Fund-Me Account" to help cover expenses they will have while trying to be by her side. Natalie has 5 children, including 2 toddlers. Natalie has always been active in the conservatee's life. Petitioner believes that if her father, the conservatee, was able to communicate he wouldn't hesitate, as he did pr8ior to his accident, to offer assistance within his means to help his family. Petition is asking the court to allow her to make a donation on conservatee's behalf to Natalie's "Go Fund Me Account" or directly to her mother, Gloria Lopez. As of March 9, 2016 Natalie's "Go Fund Me Account" is \$1,070 of their \$5,000 goal. Petitioner is asking the court to consider allowing her to donate \$4,000 in case they don't reach their goal. The			Current bond is \$171,000.00	
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Pers.Serv. Conf. Screen Letters Duties/Supp Objections Video Receipt CI Report Aff. Posting Aff. Posting Status Rpt UCCJEA Citation Recipt Citation Canf. Screen Letters Duties/Supp Objections Video Receipt CI Report Aff. Posting Status Rpt Citation Cinding 2 toddlers. Natalie has 5 children, including 2 toddlers. Natalie has always been active in the conservatee's life. Petitioner believes that if her father, the conservatee, was able to communicate he wouldn't hesitate, as he did pr8ior to his accident, to offer assistance within his means to help his family. Petition is asking the court to allow her to make a donation on conservatee's behalf to Natalie's "Go Fund Me Account" or directly to her mother, Gloria Lopez. As of March 9, 2016 Natalie's "Go Fund Me Account" is \$1,070 of their \$5,000 goal. Petitioner is asking the court to consider allowing her to donate \$4,000 in case they don't reach their goal. The		Aff.Pub.		the amount of cash
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Letters		Pers.Serv.	, ,	
Letters		Conf.	 	
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✓ Order to Natalie's "Go Fund Me Account" or directly to her mother, Gloria Lopez. As of March 9, 2016 Natalie's "Go Fund Me Account" is \$1,070 of their \$5,000 goal. Petitioner is asking the court to consider allowing her to donate Reviewed by: KT UCCJEA the court to consider allowing her to donate Updates: Citation \$4,000 in case they don't reach their goal. The Recommendation:			ner	
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Aff. Posting 2016 Natalie's "Go Fund Me Account" is Reviewed by: KT Status Rpt \$1,070 of their \$5,000 goal. Petitioner is asking UCCJEA the court to consider allowing her to donate Citation \$4,000 in case they don't reach their goal. The Recommendation:	_			, ·
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Citation \$4,000 in case they don't reach their goal. The Recommendation:		•	· · · · · · · · · · · · · · · · · · ·	
			╗	
			4 ·	
FTB Notice fund will go toward transportation, and any other expenses the family will be faced with to		FTB Notice	,	
be by her side in San Francisco.			· · · · · · · · · · · · · · · · · · ·	
Please see additional page			,	

Petitioner prays for an Order:

- 1. The account and report be approved and settled;
- 2. The acts of Conservator as shown in the account be approved;
- 3. Payment of Attorney fees in the sum of \$1,250.00 and costs of \$870;
- 4. Authorization to make a \$4,000.00 donation on behalf of the Conservatee to the Natalie Lopez "Go Fund Me Account"

Note: If the petition is granted, status hearings will be set as follows:

- Wednesday, July 6, 2016 at 9:00 a.m. in Department 303, for the filing of additional bond.
- Wednesday, March 7, 2018 at 9:00 a.m. in Department 303, for the filing of the fifth account.

Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior the date set the status hearing will come off calendar and no appearance will be required.

3 Isaac Gamez Special Needs Trust

Case No. 07CEPR01097

Attorney: Randolph M. Sharon (for Petitioner/Trustee Wells Fargo Bank)

Petition for Approval of Fifth Account Current of Trustee for the Period of April 1, 2014 to March 31, 2016; Approval of Trustee's Fees; Approval of Attorney's Fees.

31, 2016; Approval of Irustee's Fees; Approval of Aπorney's Fees.				
	WELLS FARGO BANK, Trustee, is petitioner.	NEEDS/PROBLEMS/COMMENTS:		
	Account period: 4/1/2014 - 3/31/2016			
	1,1,2011 0,01,2010			
	Accounting - \$1,465,078.74	Note: If the petition is granted,		
Cont. from	Beginning POH - \$ 995,369.18 Ending POH - \$1,020,587.07	status hearings will be set as		
Aff.Sub.Wit.		follows:		
✓ Verified	(\$18,083.42 is cash)			
Inventory	Trustee - \$31,889.11	Wednesday, June 6, 2018 at		
PTC	(already paid, 1.5% of the value of the trust	9:00 a.m. in Department		
Not.Cred.	pursuant to its published fee schedule and	303, for the filing of the sixth account.		
✓ Notice of	allowed by court order dated 5/1/2012)	decoon.		
Hrg	Trustee x/o - \$2,000.00 (in	Pursuant to Local Rule 7.5 if the		
✓ Aff.Mail W/	connection with purchase a new home and	required documents are filed		
	modifications to said home. Purchase and	10 days prior the date set the		
Aff.Pub.	modifications were allowed by court order.)	status hearing will come off		
Sp.Ntc.	Attorney - \$3,150.00 (7.5	calendar and no appearance		
Pers.Serv.	hours @ \$450.00 per hour)	will be required.		
Conf.				
Screen	Costs - \$200.00 (filing fee)			
Letters				
Duties/Supp	Trustee is a financial institution. No bond is			
Objections	required.			
Video	Petitioner prays for an order:			
Receipt	1. That all acts and transactions of the			
CI Report	Trustee appearing in the account and			
9202	report be confirmed and approved;			
√ Order	2. The investments set forth herein be			
Aff. Posting	confirmed and approved; 3. The distributions, payments, and all other	Reviewed by: KT		
Status Rpt	acts of Petitioner as set forth in the	Reviewed on: 5/31/06		
UCCJEA	account and report be confirmed and	Updates:		
Citation	approved;	Recommendation:		
FTB Notice	4. That compensation to the Trustee during	File 3- Gamez		
	the account be approved;			
	5. Trustee is authorized to pay itself an additional sum of \$2,000.00;			
	6. That reasonable compensation in the sum			
	of \$3,150.00, plus costs of \$200.00 to the			
	attorney be allowed.			

Graceson Scawthorn Lassley (GUARD/E) Case No. 10CEPR00354

Attorney: Ruth P Lind (for Stephanie Lassley)

Probate Status Hearing RE: Filing of the Fourth and Final Account

Trobate dialog freating KE. Filling OF II	NEEDS/PROBLEMS/COMMENTS:
	,
	OFF CALENDAR
Cont. from	Fourth and Final Account filed
Aff.Sub.Wit.	5/31/16 is set for hearing 7/7/16.
Verified	
Inventory	
PTC	
Not.Cred.	
Notice of	
Hrg	
Aff.Mail	
Aff.Pub.	
Sp.Ntc.	
Pers.Serv.	
Conf.	
Screen	
Letters	
Duties/Supp	
Objections	
Video	
Receipt	
CI Report 9202	
Aff. Posting	Reviewed by: SEF
Status Rpt	Reviewed by: 321 Reviewed on: 5/26/2016
UCCJEA	Updates: 5/31/16 (skc)
Citation	Recommendation:
FTB Notice	File 4- Lassley

Administrator Houston, Alice (Pro Per – Daughter – Administrator)

Status Hearing Re: Failure to File a First Account or Petition for Final Distribution.

DOD: 5/18/07	anning Recitations to the artist Account of	NEEDS/PROBLEMS/COMMENTS:
DOD. 3/ 16/07		NEEDS/FROBLEMS/COMMENTS.
		OFF CALENDAR
		First and Final Account filed 5/23/16
2 14 25244		is set for hearing on 6/30/16/
Cont. from 050416		
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of		
Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf.		
Screen		
Letters		
Duties/Supp		
Objections		
Video		
Receipt		
CI Report		
9202		
Order		
Aff. Posting		Reviewed by: skc
Status Rpt		Reviewed on: 5/25/16
UCCJEA		Updates:
Citation		Recommendation:
FTB Notice		File 5- Tims

6 Amiah Tracy, Jaedyn Grover, Ryanna Grover & Miley Grover (GUARD/P) Case No. 11CEPR01093

Petitioner Vargas, Jovanna (Pro Per – Aunt)
Petitioner Moreno, Matthew Adam (Pro Per – Uncle)

		Temporary Expires 06/01/2016	NEEDS/PROBLEMS/COMMENTS:
		GENERAL HEARING 07/07/2016	This petition pertains to Ryanna Grover
		IOVANNA VADOAS autot and MARTITUM	<u>& Miley Grover only.</u>
Co	nt. from 051716	JOVANNA VARGAS, aunt, and MATTHEW MORENO, uncle, are petitioners.	Note: Kim Brown and Anthony Brown,
	Aff.Sub.Wit.	MORENO, Oricle, are permoriers.	maternal aunt and uncle, were appointed
√	Verified	Please see petition for details	Temporary Guardians of the minors, Amiah Tracy and Jaedyn Grover, on 05/12/2016.
	Inventory		Attracts Order of 05/17/201/: Eversiner
	PTC		Minute Order of 05/17/2016: Examiner notes provided in open court. Kelly
_	Not.Cred.		Grover, mother, represents that the father
✓	Notice of Hrg		of Ryanna is Ernesto Fragaso; matter is
	Aff.Mail		continued for service as to Mr. Fragaso.
	Aff.Pub.		Christopher Moreno, father of Miley, objects to the temporary. Any written
	Sp.Ntc.		objects to the temporary. Any wither
✓	Pers.Serv.		served by 05/24/2016. Petition is granted
✓	Conf. Screen		to preserve the status quo.
✓	Letters		As of this Examiner's review on 05/27/2016, no written objections have been filed.
✓	Duties/Supp		The following issues remain:
	Objections		
	Video Receipt		Need proof of personal service five (5) days prior to the hearing of the Notice
	CI Report		of Hearing along with a copy of the
	9202		Petition for Appointment of Temporary
1	Order		Guardian or consent and waiver of notice or declaration of due diligence
•			for:
			Christopher Moreno (Father of
			Miley) – Unless the Court
			dispenses with notice
 	Aff. Posting		Please see additional page Reviewed by: LV
\vdash	Status Rpt		Reviewed by: LV Reviewed on: 05/27/2016
1	UCCJEA		Updates:
Ė	Citation		Recommendation:
	FTB Notice		File 6- Tracy & Grover
<u> </u>			

6 Amiah Tracy, Jaedyn Grover, Ryanna Grover & Miley Grover (GUARD/P) Case No. 11CEPR01093

- 2. The Notice of Hearing filed 05/16/2016 does not indicate that a copy of the petition was served with the notice on the mother at #3 on the proof of service. The Court may require clarification.
- 3. UCCJEA is incomplete. Need minor's residence information for the past 5 years.

Case No. 12CEPR00883

Attorney Attorney Kruthers, Heather H. (for Public Administrator)

Milnes, Michael A. (for Contestants Hope De Santiago and Stephen Galvan)

Petition for Probate of Will and for Letters of Administration with Will Annexed; Authorization to Administer Under the Independent Administration of Estates Act

DOD: 10/3/11			FRESNO COUNTY PUBLIC	NEEDS/PROBLEMS/COMMENTS:
Cont. from 121515, 012716, 030216, 040616, 050416		·	ADMINISTRATOR is Petitioner and requests appointment as Administrator with Will Annexed with Full IAEA without bond. Full IAEA – ok	Minute Order 5/4/16: The Public Administrator has no objection to Mr. Milnes' clients being appointed. The Court grants the Public Administrator the right temporarily to have control over the assets under the §7660 petition. If the competing petition is filed, the
<u> </u>	Aff.Sub.Wit.	S/P	Will dated 8/11/09	Public Administrator's petition shall be
	Verified		will dated of 11/09	continued to the new hearing date so that no appearance is necessary on 6/1/16.
	Inventory PTC		Residence: Fresno	, , , , , , ,
	Not.Cred.		Publication: Business Journal	As of 5/25/16, nothing further has been filed.
~	Notice of Hrg		Estimated value of estate: Real property: \$311,000.00	Minute Order 4/6/16: Mr. Milnes is admonished to address the defects in the will contest.
~	Aff.Mail			
~	Aff.Pub.		Probate Referee: Rick Smith	Note: Contest and Grounds for Objection to Probate of Purported Will & of Appointment of
	Sp.Ntc.		Contest and Grounds for	Personal Representative was filed 3/16/16;
	Pers.Serv.		Objection to Probate of	<u>however</u> , it does not appear that a summons
	Conf.		Purported Will & of	was submitted therewith for issuance pursuant
_	Screen		Appointment of Personal Representative was filed	to Probate Code §8250, and because the
ľ	Letters Duties /Supp		3/16/16. See Page 2.	document indicated this continued hearing date of 4/6/16, the Contest was not assigned
	Duties/Supp Objections	<u> </u>	c, 10, 10, 000 : a. g 0 =.	it's own separate hearing date at the counter.
	Video	<u> </u>		
	Receipt			<u>Due to notice requirements, the Contest</u> <u>cannot be heard until defects are addressed.</u>
	CI Report			The Court will set the Contest for noticed
	9202			hearing pursuant to Probate Code §8250 at
~	Order			this time.
	A# Destine	 		SEE ADDITIONAL PAGES
	Aff. Posting	<u> </u>		Reviewed by: skc
	Status Rpt UCCJEA	<u> </u>		Reviewed on: 5/25/16 Updates:
	Citation	<u> </u>		Recommendation:
	FTB Notice			File 7A - Galvan
		-		7A

Page 2

Contest and Grounds for Objection to Probate of Purported Will & of Appointment of Personal Representative filed 3/16/16 BY Hope De Santiago and Stephen Galvan, daughter and son, states:

A document dated 8/11/09 purporting to be the last will was filed in this court on 11/9/11. Petitioners are informed and believe and thereon allege that the decedent left no valid Will. Probate of the purported will should be denied on the following grounds:

- 1. The decedent was not of sound and disposing mind and therefore lacked testamentary capacity at the time of the alleged execution of the purported will.
- 2. At the time of signing, the decedent was fluent in the Spanish language and not the English language use dint he purported will, and the decedent was not able to read or understand documents written in the English language. As a result, the decedent was not able to understand or comprehend the meaning and effect of the English words used in the purported will and their significance, therefore the decedent lacked testamentary intent and the signature of the decedent to the purported will was executed by the decedent under a mistake as to its legal effect.
- 3. Petitioners allege the purported will is not and never was the decedent's will as it was made as a direct result of undue influence on the decedent by his son, **ARTHUR G. GALVAN**, and other members of his family, and it is now (sic) and never was the will of the decedent.

See contest for description of the undue influence.

Contestants also object to appointment of the Public Administrator. Petitioners state on 5/10/13, the PA was appointed under Probate Code §7660 in **13CEPR00400** and since that date has served in that capacity. In connection with this new appointment, the PA failed to give proper notice to the intestate heirs

NEEDS/PROBLEMS/COMMENTS:

- 1. Petitioner lists only the decedent's four living children at #8; however, it appears that there are additional people entitled to notice of this proceeding, including:
 - Vanessa Galvan (Daughter of deceased son Frank Garcia Galvan, mentioned in the will)
 - Vivian Saicon (Granddaughter and Named alternate executor and former conservator of the person)

Therefore, need revised declaration re #8 and proof of service of Notice of Petition to Administer Estate on Vanessa Galvan and Vivian Saicon at least 15 days prior to the hearing per Probate Code §8110.

<u>Note</u>: Petitioner's #8 indicates that the will provides for distribution to a trust; however, that does not appear to be the case. Need clarification.

2. Need date of death of Frank Garcia Galvan per Local Rule 7.1.1.D. <u>Note</u>: Declaration filed 2/26/16 indicates a date of death for a <u>David</u> Garcia Galvan. Is this a typo? There is no *David* listed at #8.

Note: If granted, the Court will set status hearings as follows:

- Wednesday Nov. 2, 2016 for fling Inventory and Appraisal
- Wednesday August 2, 2017 for filing the first account or petition for final distribution

7B Augustin G. Galvan (Estate) Case No. 12CEPR00883

Attorney

Kruthers, Heather H. (for Public Administrator)

Attorney Milnes, Michael A. (for Contestants Hope De Santiago and Stephen Galvan)

Status RE: Filing of a Competing Petition for Probate by Mr. Milnes

DOD: 10/3/11 HISTORY: On 10/3/12, Dorothy M. Galvan, NEEDS/PROBLEMS/C		
DOD. 10/3/11	Spouse, filed a Petition for Letters of	NEEDS/TROBLEMS/COMMENTS.
	Administration requesting appointment as Administrator in 12CEPR00883. The petition alleged that the decedent died intestate.	<u>Update</u> : A competing petition for Letters of Administration (not probate of will) was filed 5/27/16 by Dorothy Galvan,
Aff.Sub.Wit.	Dorothy M. Galvan also filed a Creditor's Claim for \$400,000.00.	Spouse, represented by Attorney Michael A. Milnes, which is set on 7/18/16.
Inventory	At hearing on 11/8/12, Dorothy Galvan did not	
PTC	appear; however, Attorney Milnes appeared	
Not.Cred.	on behalf of Hope De Santiago, a daughter,	
Notice of	and indicated that there was an objection. Mr.	
Hrg	Milnes further represented that a Will would be	
Aff.Mail	lodged with the Court and the Public Administrator is contemplating on filing a	
Aff.Pub.	petition. Dorothy Galvan's petition was denied	
Sp.Ntc.	without prejudice. Nothing further was filed in	
Pers.Serv.	12CEPR00883 until the PA's petition on	
Conf.	11/19/15 (described below).	
Screen	0 1 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2	
Letters	Court records reflect that a Will dated 8/11/09 was previously lodged with the Court on	
Duties/Supp	11/9/11 by J. Patrick Sullivan, Esq. (The Will is	
Objections	self-proving.)	
Video	, ,	
Receipt	On 5/10/13, the Public Administrator filed an Ex	
CI Report	Parte Petition under §7660 in 13CEPR00400,	
9202 Order	alleging that the value of the estate was not expected to exceed \$150,000.00. The Public	
Aff. Posting	Administrator was appointed by Ex Parte Order	Reviewed by: skc
Status Rpt	on 5/14/13 and authorized to administer the	Reviewed by: 5/25/16
UCCJEA	estate as intestate.	Updates: 5/31/16
Citation	Within the S7//O mention were alterite	Recommendation:
FTB Notice	Within the §7660 matter, various creditor's claims were filed and an "Appraisal for Sale"	File 7B- Galvan
	was filed on 1/15/14 alleging an estate value of \$261,000.00. Nothing further has been filed in the §7660 matter.	
	The Public Administrator filed the Petition for Probate of Will at Page A on 11/19/15.	
	SEE ADDITIONAL PAGES	

7B Augustin G. Galvan (Estate)

Case No. 12CEPR00883

Page 2

HISTORY (Cont'd): The Public Administrator's Petition filed 11/19/15 requested that the Will dated 8/11/09 that had been previously deposited with the Court on 11/9/11 be admitted to probate.

On 3/16/16, Hope De Santiago and Stephen Galvan, daughter and son, filed a Contest and Grounds of Objection to Probate of Purported Will and of Appointment of Personal Representative.

The PA's petition has been continued due to various defects and due to the Contest. However, the Contest cannot yet be heard because procedural deficiencies exist. See Page A for details.

Pursuant to Minute Order 5/4/16, it appears Hope De Santiago and Stephen Galvan intend to file a competing petition for appointment as personal representatives.

Wesley Logan (Estate)

Attorney

8

Kruthers, Heather H. (for Public Administrator)

First and Final Account and Report of Successor Administrator and Petition for Allowance of Ordinary and Extraordinary Commissions and Fees and for Distribution

DO	D: 4/28/89	FRESNO COUNTY PUBLIC ADMINISTRATOR is Petitioner.	NEEDS/PROBLEMS/ COMMENTS:
		Account period: 1/1/11 - 3/30/16 Accounting: \$35,989.19 Beginning POH: \$35,989.19 Ending POH: \$5,784.20	
~	Aff.Sub.Wit. Verified	Public Administrator (Statutory): \$1,439.57	
>	Inventory PTC Not.Cred. Notice of Hrg Aff.Mail Aff.Pub.	Attorney (Statutory): \$1,439.57 The Public Administrator proposes to pay the statutory compensation to Thomas Boyajian, attorney for the former. Mr. Boyajian presented an invoice to County Counsel; however, the invoice exceeds the statutory fee; therefore, Petitioner proposes to pay the statutory fee to Mr. Boyajian.	
	Sp.Ntc. Pers.Serv. Conf.	Public Administrator (Extraordinary): \$248.00 (for preparation and filing of final tax returns)	
>	Screen 2/20/15 Duties/Supp	Attorney (Extraordinary): \$1,215.00 Attorney for Public Administrator itemizes 8.10 hours @ \$150/hr.	
	Objections Video Receipt	Costs (Former Attorney): \$225.00 (filing, certification)	
>	9202 Order	Costs (Public Administrator): \$486.50 (filing, certification)	
	Aff. Posting Status Rpt	Bond fee: \$89.98	Reviewed by: skc Reviewed on: 5/31/16
>	UCCJEA Citation FTB Notice	Closing: \$500.00 for final fiduciary taxes Per Court Order, preliminary distributions of 30,204.99 were made to Fremon Graves, spouse of the beneficiary Rachel Graves, who has used the funds for his wife's care and daily living expenses.	Updates: Recommendation: File 8- Logan
		Petitioner requests distribution of the remaining \$140.58 to Rachel Graves, via check made out to her husband, Fremon Graves.	

9 Gabriella Krystal Simental (GUARD/E)

Case No. 14CEPR00657

Guardian Melinda C. Simental (Pro Per, mother)
Order to Show Cause

		Ī
Coi	nt. from	
	Aff.Sub.Wit.	
	Verified	
	Inventory	l
	PTC	l
	Not.Cred.	l
	Notice of	l
	Hrg	l
	Aff.Mail	I
	Aff.Pub.	١
	Sp.Ntc.	١
	Pers.Serv.	I
	Conf.	I
	Screen	I
	Letters	l
	Duties/Supp	l
	Objections	l
	Video	l
	Receipt	l
4	CI Report	l
	9202	l
	Order	١
		l
		l
		l
		١
		l
\vdash	Aff. Posting	l
\vdash	Status Rpt	١
Ħ	UCCJEA	l
一	Citation	١
	FTB Notice	١

MELINDA C. SIMENTAL, mother, was appointed Guardian of the Estate on 11/19/2014.

. . .

Minute Order dated 11/19/2014 from the hearing on the petition for appointment set the matter for status hearing on 4/20/2016 for filing of the first account of the guardianship.

Minute Order dated 4/20/2016 from the status hearing for filing of the first account of the guardianship estate states: No appearances. The Court issues an Order to Show Cause to Melinda Simental as to why she should not be removed as Guardian of the Estate for her failure to file the first account and her failure to appear today. Melinda Simental is ordered to be personally present in Court or appear via CourtCall on 6/1/2016.

Clerk's Certificate of Mailing shows a copy of the Minute Order dated 4/20/2016 was mailed to Melinda Simental on 4/20/2016.

NEEDS/PROBLEMS/COMMENTS:

- 1. Petitioner filed on 5/23/2016 a Final Inventory and Appraisal in addition to the previously filed Final Inventory and Appraisal filed on 4/16/2015. Probate Code § 2620(a) provides that at the expiration of one year from the time of appointment and thereafter not less frequently than biennially, unless otherwise ordered by the court to be more frequent, the guardian of the estate shall present the account of the assets of the estate of the ward to the court for settlement and allowance in the manner provided in Probate Code § 1060. It appears Petitioner may intend the Final Inventory and Appraisal filed 5/23/2016 as a first accounting of the Guardianship Estate. However, this filing does not comply with the requirements of Probate Code § 1060 et sea.
- 2. Final Inventory and Appraisal filed 5/23/2016 contains as an attachment a 6-page copy of two bank account statements, including the bank account number, of the blocked account held in the name of the Ward and the Guardian of the Estate. Court may wish to order that this Inventory and Appraisal with attached bank account statements filed 5/23/2016 be stricken and rescanned into Court records as a confidential document pursuant to Probate Code § 2620(c)(7).

Reviewed by: LEG
Reviewed on: 5/31/16
Updates:
Recommendation:
File 9- Simental

10 Abdolah Rahnama (CONS/PE)

Case No. 15CEPR00156

Attorney: Heather H. Kruthers (for Public Guardian – Conservator)
Attorney: Gary G. Bagdasarian (court-appointed for Conservatee)

Probate Status Hearing RE: Filing of the First Account

	PUBLIC GUARDIAN was appointed conservator of the person and estate	NEEDS/PROBLEMS/COMMENTS:
	on 4/23/2015.	
	Letters issued 5/14/2015.	OFF CALENDAR.
Cont. from	Minute order dated 4/1/2015 set this	First account filed 5/26/2016.
Aff.Sub.Wit.	status hearing for the filing of the first	
Verified	account.	
Inventory	Final Appraisal of Estate by Public	
PTC	Guardian filed 7/22/2015 shows an	
Not.Cred.	estate value of \$194.00.	
Notice of		
Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.	 -	
Conf.		
Screen	=	
Letters	=	
Duties/Supp		
Objections		
Video Receipt		
CI Report	=	
9202	4	
9202 Order	4	
Aff. Posting	1	Reviewed by: SEF
Status Rpt	=	Reviewed by: 521 Reviewed on: 5/26/2016
UCCJEA	=	Updates:
Citation	1	Recommendation:
FTB Notice	=	File 10- Rahnama

10

11 Fatemeh Shakeri (CONS/P)

Case No. 15CEPR00157

Attorney: Heather H. Kruthers (for Public Guardian – Conservator)
Attorney: Ryan Michael Janisse (court-appointed for Conservatee)

Probate Status Hearing RE: Filing of the First Account

	PUBLIC GUARDIAN was appointed conservator of the person and estate	NEEDS/PROBLEMS/COMMENTS:
	on 4/23/2015.	
	Letters issued 5/7/2015.	OFF CALENDAR.
Cont. from	Minute order dated 4/1/2015 set this	First account filed 5/26/2016.
Aff.Sub.Wit.	status hearing for the filing of the first	
Verified	account.	
Inventory	Final Appraisal of Estate by Public	
PTC	Guardian filed 7/22/2015 shows an	
Not.Cred.	estate value of \$194.01.	
Notice of		
Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf.		
Screen		
Letters		
Duties/Supp		
Objections		
Video		
Receipt		
CI Report	┪	
9202	_	
Order	4	
Aff. Posting	_	Reviewed by: SEF
Status Rpt	_	Reviewed on: 5/26/2016
UCCJEA	-	Updates:
Citation	_	Recommendation:
FTB Notice		File 11- Shakeri

11

12 Grace K. Couch (Estate) Case No. 15CEPR00174 Attorney Flanigan, Philip M. (for Debra Giuffrida – Administrator)

Probate Status Hearing RE: First or Final Account

DOD: 11/29/2014	DEBRA GIUFFRIDA, daughter, was	NEEDS/PROBLEMS/COMMENTS:
DOD: 11/27/2014	appointed Administrator with full IAEA	NEEDS/TRODEEMS/COMMENTS.
	authority on 04/01/2015 without bond.	Need First Account or Petition for
	=	Final Distribution.
Cont. from	Letters issued on 04/02/2016	
Aff.Sub.Wit.	Einal Inventory and Appraisal filed	
Verified	Final Inventory and Appraisal filed 08/03/2015 shows an Estate valued at	
Inventory	\$194,258.78.	
PTC	 	
Not.Cred.	Minute Order of 04/01/2015 set this	
Notice of	Status Hearing for the filing of the First and/or Final Account.	
Hrg	ana/or Final Account.	
Aff.Mail	Declaration of Philip M. Flanigan and	
Aff.Pub.	Status Report and Request for	
Sp.Ntc.	Continuance filed 05/24/2016 states the	
Pers.Serv.	petition completed the sale of the	
Conf.	decedent's residence and it is believed she had deposited the funds into an	
Screen	estate account. It is unknown whether	
Letters	any outstanding obligations are owed	
Duties/Supp	by the estate but to date, no creditor	
Objections	claims have been filed and the time for	
Video	filing claims has expired.	
Receipt	Petitioner unfortunately had to have	
CI Report	knee surgery and had to make the	
9202	decision to relocate to Henderson, NV	
Order	so she could be taken care of by a	
Aff. Posting	close friend because she was unable to care for herself. Due to the move, Mr.	Reviewed by: L∨
Status Rpt	Flanigan's office was unable to reach	Reviewed on: 05/31/2016
UCCJEA	her by mail, phone or email because	Updates:
Citation	she did not have an address or phone	Recommendation:
FTB Notice	to where she could be reached. She is	File 12- Couch
	now able to be reached and is	
	recovering well, but needs some time to	
	complete documents required to	
	complete the first and final account.	
	Mr. Flanigan respectfully requests that	
	this matter be continued to 08/01/2016	
	so the petition can complete the last	
	few items needed to file the First and	
	Final Account.	

Lei'Lani Shabazz (GUARD/P) Case No. 15CEPR00817 13

Petitioner Goodwin, Herbert D. (Pro Per – Father)

Petition for Termination of Guardianship

Ag	e: 3		HERBERT D. GOODWIN, father, is	NEEDS/PROBLEMS/COMMENTS:
			petitioner.	, ,
				1. Need Notice of Hearing.
			Please see petition for details	
	ent. from			2. Need proof of service fifteen (15)
	Aff.Sub.Wit.			days prior to the hearing of the
-				Notice of Hearing along with a copy of the Petition for
✓	Verified			Termination of Guardianship for:
	Inventory			Andriette Brezel MCCray
	PTC			(Guardian)
	Not.Cred.			 Uchechi Subira Shabazz
	Notice of	Х		(Mother)
	Hrg			Paternal Grandparents (Net Lister)
	Aff.Mail	Χ		(Not Listed)Tammy Cooks (Maternal
	Aff.Pub.			Grandmother)
	Sp.Ntc.			G. G
	Pers.Serv.	Χ		
	Conf.			
	Screen			
	Letters			
	Duties/Supp			
	Objections			
	Video			
	Receipt			
✓	CI Report			
	9202			
1	Order			
	Aff. Posting			Reviewed by: LV
	Status Rpt			Reviewed on: 05/31/2016
	UCCJEA			Updates:
	Citation			Recommendation:
	FTB Notice			File 13- Shabazz

14 Christina Estrada (GUARD/P)

Case No. 16CEPR00017

Petitioner Ripson, Ila (Pro Per – Mother – Petitioner)

Guardian Shipman, Amy (Pro Per – Non-Relative – Guardian) Guardian Shipman, Gary (Pro Per – Non-Relative – Guardian)

Petition for Visitation

			See petition for details.	NEEDS/PROBLEMS/COMMENTS:
-	Aff.Sub.Wit. Verified Inventory		•	1. Need Notice of Hearing and proof of service of Notice of Hearing at least 15 days prior to the hearing on the Guardians and the minor.
	PTC			
	Not.Cred. Notice of Hrg	Х		
	Aff.Mail	Χ		
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			
	Conf. Screen			
	Letters			
	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report			
	9202			
	Order			
	Aff. Posting			Reviewed by: skc
	Status Rpt			Reviewed on: 5/31/16
	UCCJEA			Updates:
	Citation			Recommendation:
	FTB Notice			File 14- Estrada

14

Attorney

Probate Status Hearing RE: Receipt for Blocked Account

	Probate Status Hearing RE: Rec	eipt for Blocked Account
	=	NEEDS/PROBLEMS/COMMENTS:
		OFF CALENDAR
	=	Receipt for Blocked Account filed
Aff.Sub.Wit.	=	5/24/16
Verified	=	
Inventory		
PTC		
Not.Cred.		
Notice of		
Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf.		
Screen		
Letters		
Duties/Supp		
Objections		
Video		
Receipt		
CI Report		
9202	_	
Order	_	
Aff. Posting	<u> </u>	Reviewed by: skc
Status Rpt	4	Reviewed on: 5/31/16
UCCJEA	4	Updates:
Citation	4	Recommendation:
FTB Notice		File 15- Murphy

16 Leann Moreno and Leo Moreno IV (GUARD/P) Case No. 16CEPR00041 Petitioner: Efrain Palma (Pro per – Maternal step-grandfather)

Petition for Appointment of Guardian of the Person (as to LEANN MORENO only)

	TEMPORARY EXPIRES 6/1/2016	NEEDS/PROBLEMS/COMMENTS:
		, i
	EFRAIN PALMA, maternal step-	
	grandfather, is petitioner	Petition is as to <u>LEANN MORENO</u> only.
Cont. from 031616,	Court Investigator report filed 3/9/2015.	Only.
042716		
Aff.Sub.Wit.		Minute order dated 4/27/2016
✓ Verified		states Leo Moreno (father) requests a continuance because
Inventory	See petition for details.	Belinda Gomez (mother) is in the
PTC	,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,	hospital. The Court notes
Not.Cred.		Ms. Gomez has consented, but
✓ Notice of		grants one continuance so that she may appear. The Court grants
Hrg Aff.Mail		temporary orders and continued
		the matter to 6/1/2016.
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
✓ Conf. Screen		
✓ Letters		
✓ Duties/Supp		
Objections		
Video		
Receipt		
✓ CI Report		
9202		
√ Order		
Aff. Posting		Reviewed by: SEF
Status Rpt		Reviewed on: 5/26/2016
✓ UCCJEA		Updates:
Citation		Recommendation:
FTB Notice		File 16- Moreno

Petitioner Corina Torres (Pro Per, maternal aunt)

	Petition for Appointment of Guardian of the Person				
		_	NO TEMPORARY REQUESTED	NEEDS/PROBLEMS/COMMENTS:	
			CORINA TORRES , maternal aunt, is Petitioner.	Need Notice of Hearing.	
Cont. from			~Please see Petition for details~	Need proof of personal service of the Notice of Hearing with a copy of the	
√	Aff.Sub.Wit. Verified		ricase see reimien ier aerane	Petition for Appointment of Guardian, or Consent to Appointment of Guardian and Waiver of Notice, or a	
	Inventory		Court Investigator's Report was	Declaration of Due Diligence, for:	
	PTC		filed on 5/23/2016.	Urbano Magana, father;	
	Not.Cred.			and/or	
	Notice of Hrg	Χ		 Oscar Lopez Gonzalez, father on birth certificate. 	
	Aff.Mail	Χ		3. Need proof of service by mail of the	
	Aff.Pub.			Notice of Hearing with a copy of the	
	Sp.Ntc.			Petition for Appointment of Guardian,	
	Pers.Serv.	Χ		or Consent to Appointment of	
√	Conf.			Guardian and Waiver of Notice, or a	
	Screen			Declaration of Due Diligence, for: • paternal grandfather;	
		Χ		Sarah Gonzalez, paternal	
	Duties/Supp			grandmother listed in <i>Child</i>	
	Objections			Information Attachment.	
	Video Receipt			Paternal grandmother (mother of Urbano Magana);	
✓	CI Report			 Rafael Torres, maternal grandfather; 	
✓	Clearances			• Maternal grandmother.	
	Order	X		Need Duties of Guardian form signed by Petitioner.	
				5. Need proposed order and proposed letters.	
	Aff. Posting			Reviewed by: LEG	
	Status Rpt			Reviewed on: 5/31/16	
✓	UCCJEA			Updates:	
	Citation			Recommendation:	
	FTB Notice			File 17- Lopez	
				17	

Petitioner

Villa, Maria Rosalva (Pro Per – Maternal Grandmother – Petitioner)

Petition for Appointment of Guardian of the Person

		See polition for details	NEEDS / PROPIEMS /
		See petition for details.	NEEDS/PROBLEMS/ COMMENTS:
			COMMENTS:
			Atinute Order 4/24/14
			Minute Order 4/26/16 (Temp): The Court finds due
			diligence and dispenses
	Aff.Sub.Wit.		with notice as to the
	Verified	=	unknown father. Maria Villa
l –			is admonished to never
	Inventory		leave the minor glone with
	PTC		the mother.
	Not.Cred.		
~	Notice of		1. According to the Court
	Hrg		Investigator's report, the
	Aff.Mail		mother identified the
	Aff.Pub.		father as JONATHAN CASILLAS. Therefore,
	Sp.Ntc.		need personal service
>	Pers.Serv.		on the father and
~	Conf.		service on the paternal
	Screen		grandparents pursuant
~	Letters		to Probate Code §1511.
~	Duties/Supp		
	Objections		
	Video		
	Receipt		
>	CI Report		
~	Clearances		
~	Order		
	Aff. Posting		Reviewed by: skc
	Status Rpt		Reviewed on: 5/31/16
~	UCCJEA		Updates:
	Citation		Recommendation:
	FTB Notice		File 18- Villa

18

19 Josiah Gonzalez (GUARD/P)

Petitioner: Nadine Gonzalez (pro per)
Petitioner: Mario Gonzalez, JR (pro per)

Objector: Daisy Banda (pro per)

Petition for Appointment of Guardian of the Person

Case No. 16CEPR00355

	TEMPORARY EXPIRES 6/1/2016	NEEDS/PROBLEMS/COMMENTS:
Cont. from Aff.Sub.Wit. Verified Inventory PTC Not.Cred. Notice of Hrg Aff.Mail W/ Aff.Pub. Sp.Ntc. Pers.Serv. W/ Conf. Screen Letters Duties/Supp Objections Video Receipt CI Report 9202 Order	TEMPORARY EXPIRES 6/1/2016 NADINE RENA GONZALEZ and MARIO GONZALEZ JR, step-grandmother and paternal grandfather, are petitioners Please see petition for details. Objection To Guardianship filed by Daisy Banda on 4/11/2016 Court Investigator Jennifer Young's Report filed on 5/26/16	 NEEDS/PROBLEMS/COMMENTS: Petition lists petitioner Nadine Gonzalez as the paternal grandmother. She is the paternal step-grandmother. Therefore need name and address of the biological paternal grandmother. Need proof of service of the Notice of Hearing along with a copy of the Petition or consent and waiver of notice or declaration of diligence on: Paternal grandmother Unknown maternal grandfather – unless court dispenses with notice.
Aff. Posting	-	Reviewed by: KT
Status Rpt	1	Reviewed by: K1
UCCJEA	1	Updates:
Citation		Recommendation:
FTB Notice		File 19- Gonzalez
<u> </u>		10

Attorney Mele, James J. (for Rose Mary Litton – Petitioner – Spouse)

Petition for Letters of Administration; Authorization to Administer Under the IAEA

			remion for teners of Administration, Admo	1
DC	D: 05/05/2007		ROSE MARY LITTON, surviving spouse, is	NEEDS/PROBLEMS/COMMENTS:
			petitioner and requests appointment	
			as administrator without bond.	Minute Order of 05/11/2016: The
				Court will allow the Inventory and
			All heirs waive bond	Appraisal completed by the referee
Со	nt. from 05111	6		that was not appointed only this one
	Aff.Sub.Wit.		Full IAEA – o.k.	time.
1	Verified			
_			Decedent died intestate	Note: If the petition is granted status
	Inventory			hearings will be set as follows:
	PTC		Residence: Fresno	· · · · · · · · · · · · · · · · · · ·
	Not.Cred.		Publication: The Business Journal	• Monday, 11/02/2016 at
		<u> </u>		9:00a.m. in Dept. 303 for the filing
✓	Notice of		Estimated value of the Estate:	of the inventory and appraisal
	Hrg		Real property - \$185,000.00	and
✓	Aff.Mail	w/	(Tear property \$100,000.00	
√	Aff.Pub.		Probate Referee: Steven Diebert	• Monday, 08/02/2017 at 9:00a.m. in Dept. 303 for the filing
	C NIL-			of the first account and final
	Sp.Ntc.			
	Pers.Serv.			distribution.
	Conf.			Pursuant to Local Rule 7.5 if the required
	Screen			documents are filed 10 days prior to the
1	Letters			hearings on the matter the status hearing
	Duling /Cumm			will come off calendar and no
✓	Duties/Supp			appearance will be required.
	Objections			appearance will be required.
	Video			
1	Receipt			
	CI Report			
	9202			
1	Order	<u> </u>		
H	Aff. Posting			Reviewed by: LV
	Status Rpt	1		Reviewed by: 27 Reviewed on: 05/27/2016
	UCCJEA			
-				Updates:
<u> </u>	Citation			Recommendation: Submitted
	FTB Notice			File 20- Litton
				20

John Lang (Det. Succ) 21

Case No. 16CEPR00367

Attorney Amador, Catherine A. (for Alma D. Lousberg - Petitioner – Ex Spouse) Petition to Determine Succession to Real Property

DOD: 01/20/2016	ALMA D. LOUSBERG, ex-spouse, is	NEEDS/PROBLEMS/COMMENTS:
	petitioner.	
	40 days since DOD	Note: Page #24 is a related case. It is the Petition for Appointment of Guardian of the Estate filed by Alma D. Lousberg,
Cont. from 051216 Aff.Sub.Wit.	No other proceedings	mother/petitioner.
✓ Verified	I&A – NEED	Note: Petitioner originally filed in Pro Per
Inventory X	Will dated: 03/20/2015	however has now retained Catherine Amador.
PTC Not.Cred.	Petitioner requests permission to enter the	Minute Order of 05/12/2016: Examiner notes
Notice of X	real property and to sell the real property and place the funds into a trust account.	provided in open court.
Aff.Mail X	Petitioner states that both homeless and drug addicted individuals are stealing	As of this Examiner's review on 05/27/2016, there has been nothing new filed.
Aff.Pub. Sp.Ntc.	personal property from the home, breaking windows, hanging around at	The deficiencies with the pleadings include,
Pers.Serv.	night and causing problems around the	but are not limited to, the following:
Conf. Screen	empty house. Petitioner states it is essential that she be able to conduct	It does not appear that the petitioner
Letters	business regarding the home. There are no other heirs to decedent's estate.	has the standing to petition the Court as she is not the successor in interest. The
Duties/Supp Objections	Decedent named the petitioner as administrator of his estate in his will.	minor child, Emma Lang's is the successor in interest therefore the duly
Video Receipt	Petitioner prays that the Court grants her	appointed guardian of her estate can petition on her behalf.
CI Report	the permission to change ownership of	
9202	Decedent's home located at 648 North	2. This petition can only pass the
Order x	Van Ness, Fresno, Ca. 93728. She further requests that the Court allow her to enter the home in order to secure it better and stem the tide of burglaries that have been occurring there since Decedent's death in January.	decedent's property to the successor in interest any other requests regarding the real property should be made in the Guardianship of the Estate case.
		<u>Please see additional page</u>
Aff. Posting	_	Reviewed by: LV
Status Rpt		Reviewed on: 05/27/2016
UCCJEA	_	Updates:
Citation	_	Recommendation:
FTB Notice		File 21- Lang
		21

21(additional page) John Lang (Det. Succ)

Case No. 16CEPR00367

- 3. Petition was opened using a Fee Waiver. Filing fees are considered cost of administration and must be paid prior to distribution of property. Filing fee of \$435 will be due prior to distribution of the real property should the Court grant this petition.
- 4. Need original will to be deposited with the Court pursuant to Probate Code §8200(a)(1).
- 5. Need Inventory and Appraisal.
- 6. Attachment 11 does not include the decedent's interest in real property.
- 7. Need Notice of Hearing.
- 8. Need proof of service of the Notice of Hearing on Emma Lang.
- 9. Need Order. Local Rule 7.1 states a proposed Order shall be submitted with all pleadings that request relief. If the proposed order is not received in the Probate Filing Clerk's Office ten (10) days before the scheduled hearing, a continuance may be required.

22 Karen McCrystyn (Estate) Case No. 16CEPR00431
Attorney Pascuzzi, Susan L. (for Kelley Youngs – Petitioner – Daughter)
Petition for Letters of Administration with IAEA

DC	D: 03/31/2016		KELLEY YOUNGS, daughter is petitioner	NEEDS/PROBLEMS/COMMENTS:
			and requests appointment as	
			Administrator without bond.	Note: If the petition is granted status hearings will be set as follows:
			Sole heir waives bond	_
Co	nt. from	ī		• Wednesday, 11/02/2016 at
	Aff.Sub.Wit.		Full IAEA – o.k.	9:00a.m. in Dept. 303 for the filing
✓	Verified		Decedent died intestate	of the inventory and appraisal and
-	Inventory			 Wednesday, 08/02/2017 at
	PTC		Residence: Clovis	9:00a.m. in Dept. 303 for the filing
	Not.Cred.		Publication: The Business Journal	of the first account and final
✓	Notice of		Estimated value of the Estate:	distribution.
	Hrg		Personal property - \$500,000.00	
✓	Aff.Mail	w/	, , , , , , , , , , , , , , , , , , , ,	Pursuant to Local Rule 7.5 if the required
✓	Aff.Pub.		Probate Referee: Rick Smith	documents are filed 10 days prior to the hearings on the matter the status hearing
	Sp.Ntc.			will come off calendar and no
	Pers.Serv.			appearance will be required.
	Conf.			
	Screen			
√	Letters			
✓	Duties/Supp			
	Objections			
	Video			
<u> </u>	Receipt			
	CI Report			
	9202			
✓	Order			
	Aff. Posting			Reviewed by: L∨
	Status Rpt			Reviewed on: 05/31/2016
	UCCJEA			Updates:
	Citation			Recommendation: Submitted
	FTB Notice			File 22- McCrystyn
_				22

23 Georgina Jannette Caballero (CONS/P) Case No. 16CEPR00432

Attorney Kruthers, Heather H (for Public Guardian)

Petition for Appointment of Probate Conservator (Initial)

		TEMP EXPIRES 06/01/2016	NEEDS/PROBLEMS/COMMENTS:
		PUBLIC GUARDIAN is Petitioner.	Court Investigator advised rights on 05/19/2016
Cont. from		Please see petition for details	
Aff.Sub.Wit.			
Inventory			
PTC			
Not.Cred.			
✓ Notice of Hrg			
✓ Aff.Mail	w/		
Aff.Pub.			
Sp.Ntc.			
✓ Pers.Serv.	w/		
Conf. Screen			
✓ Letters			
Duties/Supp			
Objections			
Video			
Receipt			
✓ CI Report			
9202			
✓ Order			
Aff. Posting			Reviewed by: LV
Status Rpt			Reviewed on: 05/31/2016
UCCJEA			Updates:
✓ Citation			Recommendation:
FTB Notice			File 23- Caballero

24 Emma Lang (GUARD/E) Case No. 16CEPR00433

Attorney Amador, Catherine A. (for Alma D. Lousberg - Petitioner – Mother)

Petition for Appointment of Guardian of the Estate (Initial)

Petition for Appointment of Guardian of the Estate (Initial)					
			TEMPORARY DENIED ON 06/01/2016	NEEDS/PROBLEMS/COMMENTS:	
Co ✓	nt. from Aff.Sub.Wit. Verified Inventory PTC Not.Cred. Notice of Hrg Aff.Mail Aff.Pub. Sp.Ntc. Pers.Serv.	X X	ALMA D. LOUSBERG, mother, is petitioner and requests appointment as Guardian of the Estate without bond. Please see petition for details	 Note: Page #21 is a related case. It is the Petition to Determine Succession filed by Alma D. Lousberg, mother/petitioner. Note: Petitioner originally filed in Pro Per however has now retained Catherine Amador. Need Notice of Hearing. Need proof of service fifteen (15) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Appointment of Guardian or consent and waiver of notice or declaration of due diligence for: Dennis Lang (Paternal 	
1	Conf. Screen			Grandfather) • Josefina Rios (Maternal	
1	Letters			Grandmother)	
√	Duties/Supp			3. Absent showing of good cause, it is the policy of the Court to block all funds in a	
	Objections Video Receipt CI Report			guardianship estate. Petitioner states the estimated value of the estate is zero. Need clarification regarding the estimated value of the estate.	
	9202		1	4. #9c. of the Order states that \$80,000.00	
1	Order			to be deposited into a blocked account. Is this in addition to the real property? Need clarification.	
	Aff. Posting			Reviewed by: LV	
	Status Rpt			Reviewed on: 05/31/2016	
	UCCJEA			Updates:	
	Citation			Recommendation:	
	FTB Notice			File 24- Lang	
			·	24	

Attorney Jaech, Jeffrey A. (for Dennis Salwasser – Petitioner – Son)

Probate of Will and for Letters Testamentary with IAEA

DOD: 05/17/2015			DENNIS SALWASSER, son/named	NEEDS/PROBLEMS/COMMENTS:
			Executor without bond is petitioner. Full IAEA – o.k.	Petition indicates decedent's residence at the time of death
Со	nt. from		Will dated: 12/30/1999	was Reedley, California, therefore the correct publication
	Aff.Sub.Wit.			should be The Reedley Exponent.
✓	Verified		Residence: Reedley Publication: The Business Journal	Petitioner published in The Fresno Business Journal.
	Inventory		r concentrit the besites seemal	Bosinioss scomian.
	PTC		Estimated value of the Estate:	
	Not.Cred.		Personal property - \$214,120.00	Note: If the petition is granted status
✓	Notice of Hrg		Probate Referee: Steven Diebert	hearings will be set as follows: • Wednesday, 11/02/2016 at
✓	Aff.Mail	w/		9:00a.m. in Dept. 303 for the filing
	Aff.Pub.			of the inventory and appraisal
	Sp.Ntc.			<u>and</u>
	Pers.Serv.			• Wednesday, 08/02/2017 at
	Conf.			9:00a.m. in Dept. 303 for the filing
1	Screen Letters			of the first account and final distribution.
√	Duties/Supp			Pursuant to Local Rule 7.5 if the required
	Objections			documents are filed 10 days prior to the
	Video			hearings on the matter the status hearing will come off calendar and no
	Receipt			appearance will be required.
	CI Report			
	9202			
✓	Order			
	Aff. Posting			Reviewed by: LV
	Status Rpt			Reviewed on: 05/31/2016
	UCCJEA			Updates:
	Citation			Recommendation:
	FTB Notice			File 25- Salwasser
				25

26A Attorney Attorney

Case No. 16CEPR00435

Gilberto Artega Medrano (CONS/PE) Case No. Ruiz, Richard A. (for Petitioner Jessica Hernandez – Granddaughter) Istanboulian, Flora (Court appointed for Proposed Conservatee)

Petition for Appointment of Probate Conservator of the Person and Estate

	See petition for details.	NEEDS/PROBLEMS/ COMMENTS:
		Court Investigator advised rights on 5/19/16.
Aff.Sub.Wit.		Voting rights affected – need minute order.
Inventory PTC		Minute Order 5/3/16 (Temp): Mr. Krbechek
Not.Cred. V Notice of		states that he intends to file a competing petition. Both Mr. Ruiz and Mr.
Aff.Mail Aff.Pub.		Krbechek agree that a temporary conservator is
Sp.Ntc. Pers.Serv. w		not necessary today; Mr. Ruiz withdraws the temporary petition. The
Conf. Screen		general hearing remains set for 6/1/16 and the competing petition shall
V Letters Duties/Supp Objections		be set for the same date if timely filed.
Video Receipt		Note: See Page B re competing petition filed
✓ CI Report 9202		5/3/16 by Helen Medrano, Spouse.
✓ Order Aff. Posting		SEE ADDITIONAL PAGES Reviewed by: skc
Status Rpt UCCJEA Citation		Reviewed on: 5/31/16 Updates: Recommendation:
FTB Notice		File 26A- Medrano

26A

26A Gilberto Artega Medrano (CONS/PE) Case No. 16CEPR00435

Page 2

NEEDS/PROBLEMS/COMMENTS:

- 1. Need clarification re the request for conservatorship of the estate with reference to Local Rule 7.15.4., which states that when the only asset of a proposed Conservatee is public benefits, conservatorship of the estate is not required.
- 2. The Capacity Declaration does not address the request for dementia medication powers.
- 3. Notice of Hearing was served on relatives <u>without</u> a copy of the petition as required by Probate Code §1822. Further notice may be required.
- 4. The competing petition filed by Helen Medrano lists numerous additional relatives that were not listed or given notice by Ms. Hernandez. Further notice may be required.

26B Attorney Attorney

Case No. 16CEPR00435

Gilberto Artega Medrano (CONS/PE) Case No. 16Cl Krbechek, Randolf (for Helen Medrano – Spouse – Competing Petitioner) Istanboulian, Flora (Court appointed for Proposed Conservatee)

Petition for Appointment of Probate Conservator of the Person and Estate

	See petition for details.	NEEDS/PROBLEMS/COMMENTS:
Aff.Sub.Wit. Verified Inventory PTC Not.Cred. Notice of Hrg Aff.Mail Aff.Pub. Sp.Ntc. Pers.Serv. Conf. Screen Letters Duties/Supp	See petition for details.	 Need Citation and proof of personal service of Citation with a copy of the petition at least 15 days prior to the hearing per Probate Code §1824 on Proposed Conservatee. Proof of Service indicates service of Citation on 5/22/16; however, the Citation has not been filed, and 5/22/16 is only 9 days prior to the hearing.
Objections Video		
Receipt CI Report		
✓ CI Report 9202		
✓ Order	-	
Aff. Posting		Reviewed by: skc
Status Rpt		Reviewed on: 5/31/16
UCCJEA		Updates:
Citation >		Recommendation:
FTB Notice		File 26B- Medrano

26B

27 Deshawn Bragg (GUARD/P)
Petitioner: Stanley Wayne Bragg (Pro per – Brother)

Case No. 16CEPR00531

	GENERAL HEARING 7/20/2016	NEEDS/PROBLEMS/COMMENTS:
	STANLEY BRAGG, JR., brother, is petitioner	1. Need Notice of Hearing.
		2. Need proof of personal service of
Cont. from		Notice of Hearing with copy of
Aff.Sub.Wit.	7	petition at least 5 court days
✓ Verified	See petition for details.	before hearing <u>or</u> consent and waiver of notice <u>or</u> declaration of
Inventory		due diligence for:
PTC		a. Catina Owens (mother)
Not.Cred.		
Notice of		
Hrg	_	
Aff.Mail	╡	
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
✓ Conf.		
Screen	=	
✓ Letters		
✓ Duties/Supp		
Objections		
Video		
Receipt	_	
CI Report		
9202	_	
✓ Order		
Aff. Posting	_	Reviewed by: SEF
Status Rpt		Reviewed on: 5/27/2016
✓ UCCJEA		Updates:
Citation		Recommendation:
FTB Notice		File 27- Bragg

28 Maria Marez, Daniel Marez, Briahana Marez & Arturo Nunez (Guard/P) Case No. 06CEPR01163

Petitioner: Maria C. Lopez (pro per)

		General Hearing 7/20/16	NEEDS/PROBLEMS/COMMENTS:
Cont. from Aff.Sub.Wi Verified Inventory PTC Not.Cred. Notice of Hrg Aff.Mail Aff.Pub. Sp.Ntc. Pers.Serv. Conf. Screen Letters Duties/Sup	W/ X Dp	General Hearing 7/20/16 MARIA C. LOPEZ, maternal grandmother, is petitioner. Please see petition for details.	NEEDS/PROBLEMS/COMMENTS: This petition is as to ARTURO NUNEZ only. Petitioner was previously appointed guardian of Maria, Daniel and Briahana. 1. Need proof of personal service of the Notice of Hearing along with a copy of the temporary petition or Consent and Waiver of Notice or Declaration of Due Diligence on: a. Arturo Nunez (father) b. Regina Carrillo (mother)
Video Receipt	3		
CI Report			
✓ Order			
Aff. Posting	g		Reviewed by: KT
Status Rpt			Reviewed on: 5/31/16
√ UCCJEA			Updates:
Citation			Recommendation:
FTB Notice	•		File 28- Marez & Nunez

Petitioner Janna Linn Morwill (Pro Per, maternal aunt)
Petitioner Cyd Ranae Morwill (Pro Per, maternal aunt)

	remion to Appointment of temporary Guardian of the reison				
			General Hearing set for 8/1/2016	NE	EDS/PROBLEMS/COMMENTS:
	nt. from Aff.Sub.Wit. Verified Inventory PTC Not.Cred. Notice of Hrg Aff.Mail Aff.Pub. Sp.Ntc. Pers.Serv. Conf. Screen Letters Duties/Supp Objections Video Receipt CI Report 9202 Order	X	General Hearing set for 8/1/2016 JANNA LINN MORWILL and CYD RANAE MORWILL, maternal aunts, are Petitioners. ~Please see Petition for details~	2.	Need Notice of Hearing and proof of five (5) court days' notice by personal service of the Notice of Hearing with a copy of the Petition for Appointment of Temporary Guardian, or Consent to Appointment of Guardian and Waiver of Notice, or a Declaration of Due Diligence for: • Father. Need Attachment 3 explaining answer to Item 3 of Petitioner Janna Moorwill's Confidential Guardian Screening form filed on 5/18/2016. Child Information Attachment states the child is a member of the Mona Indian Tribe. Petitioners must complete the original Notice of Child Custody Proceeding for Indian Child (Form ICWA-030), which the Court will serve on necessary agencies. File contains a blank copy of this form for the Petitioners to complete and return to the Probate Clerk as soon as possible for filing and
	Aff Posting			Po	service.
	Aff. Posting			_	viewed by: LEG
	Status Rpt				viewed on: 5/31/16
	UCCJEA				dates:
	Citation				commendation:
<u>L</u>	FTB Notice			File	e 29- Villanueva
					29